HIM, GOOD and the HIMS

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Agenda

- How to improve collaborative work?
- How to manage enterprise-scale change?
- How to take enterprise technology beyond *communication* into *collaboration*?

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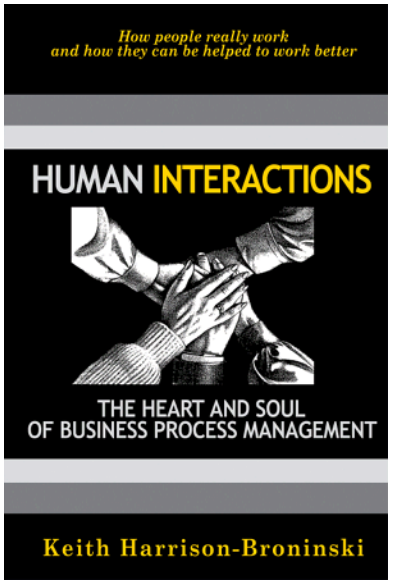
Transforming work

- "Human Interactions" (2005)
  - "the overarching framework for 21st century business technology"
    Editor, CIO Magazine
- The standard, peer-reviewed theory of collaborative human work
  - http://bit.ly/him-theory
- Principles and patterns for effective, efficient, adaptive knowledge work
  - Can be used without supporting technology
  - Spreadsheet-based consulting method enough to introduce transparency and double productivity



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HIM Testimonials

- After spending significant time analyzing release management activities using mainstream process notations, the Business Support Group (EMEA) of Sun Microsystems switched to HIM notation, and within 2 weeks had captured, agreed and improved the entire process.
- Praxis High Integrity Systems halved the effort required to fix faults via creation of a HIM-based lab.
- PCG Campbell used HIM to make a paradigm shift to better understanding of individual roles and decentralized, goal-driven management practices.

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The 5 Principles of HIM

1. Build effective teams
2. Communicate in a structured way
3. Create, share and maintain knowledge
4. Align your time with strategic goals
5. Negotiate next steps as you work

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Under the hood - the HIM Model

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HIM users see Plans

- **Plans** contain **Stages** with different purposes
  - In each Stage, people play **Roles** to provide **Deliverables**
  - Stage members have access to its Deliverables
  - **Messages** sent in a Stage go to all Stage members
- Plan **owner** oversees work
  - Creating Plans from **Templates**
  - Starting, ending, adding, removing and changing Stages
  - Others have more limited options for Plan change

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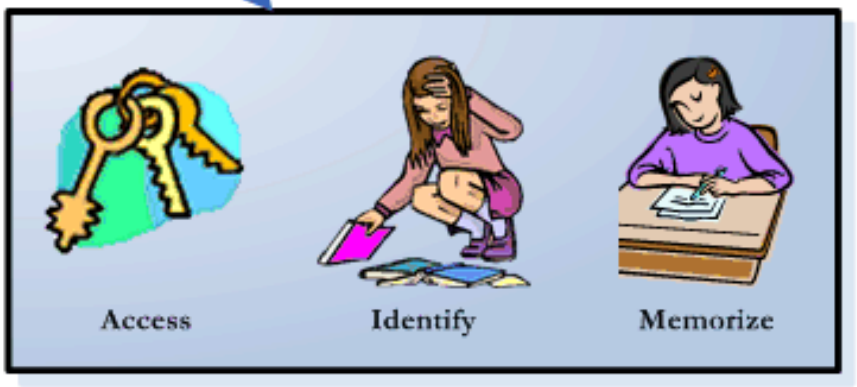
HIM users see patterns for work

- REACT

- AIM



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HIM users see patterns for management

- Strategic Control
  - Setting goals and objectives
- Executive Control
  - Assigning resources
- Management Control
  - Delivering results

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Example Plan template as spreadsheet

Stage	Role	Activity	Deliverables	Deliverable Type
Dispute	Case Administrator	Explain Basis	Explanation	Uploaded File
			Explanation Summary	Multi-line Text
		Attribute To Third Party	Agree Third Party Responsible?	Checkbox
			Pursue Third Party?	Checkbox
	Case Supervisor			
	Infringer	Counter Claim	Dispute Reason	Uploaded File
			Dispute Reason Summary	Multi-line Text
		Attribute To Third Party	Third Party Name	Single-line Text
			Third Party Organization	Single-line Text
			Third Party Contact Details	Multi-line Text
		Assign Lawyer	Infringer Lawyer Name	Single-line Text
			Infringer Lawyer Organization	Single-line Text
			Infringer Lawyer Contact Details	Multi-line Text
Legal Correspondence	Case Administrator			
	Case Supervisor			
	Infringer	Respond	Infringer Response	Uploaded File
			Infringer Response Summary	Multi-line Text
		Propose Mediation	Infringer Mediator Name	Single-line Text
			Infringer Mediator Organization	Single-line Text
			Infringer Mediator Contact Details	Multi-line Text
	Infringer Lawyer	Respond	Infringer Lawyer Response	Uploaded File
			Infringer Lawyer Response Summary	Multi-line Text
		Propose Mediation	Infringer Lawyer Mediator Name	Single-line Text
			Infringer Lawyer Mediator Organization	Single-line Text
			Infringer Lawyer Mediator Contact Details	Multi-line Text
	Supervising Lawyer			
	Paralegal	Submit Demand	Demand Letter	Uploaded File
			Formal Undertakings	Uploaded File
			Demand Date	Date

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Benefits of HIM

- Turn chaos into order
  - Replace byzantine, unusable flowcharts (GANTT charts, documents, …)
  - With clear, simple descriptions
  - That everyone can understand
- Provide a basis for managing work
  - Assign responsibilities
  - Control statuses of Stages and deliverables
  - Distinguish Plans and sub-Plans
- Improve **efficiency** and **effectiveness**
  - **Double productivity**
  - Align work with **organizational goals**

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Transforming organizations

- A generic business change methodology
- That integrates high- and low-level activities
- By focusing on **Change Aims**
  - **To ensure that work meets stakeholder needs**
    Identify stakeholders, (internal and external, organizational and individual) and communicate with them effectively
  - **To deliver results into a business-as-usual environment**
    With all necessary resources in place and without disruption to working patterns
  - **To maximize benefits from outcomes**
    Work out in advance what the benefits will be then ensure that the consequent work realizes these benefits
  - **To minimize the costs associated with delivery**
    Managing dependencies and risks

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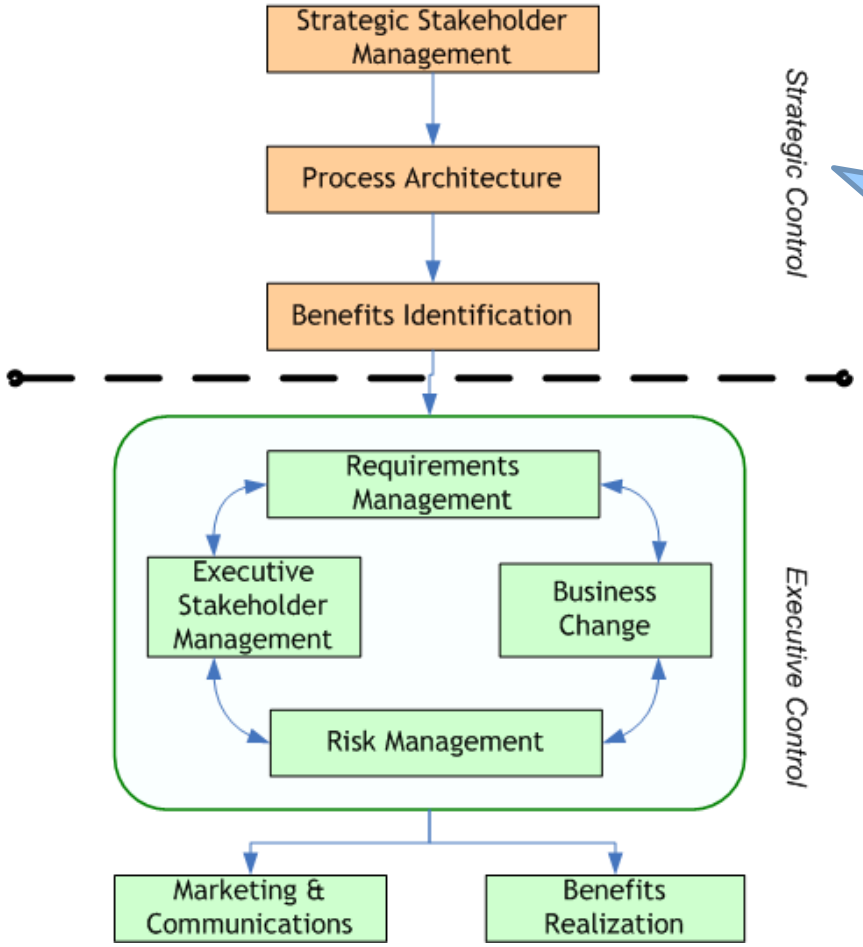
Goal-Oriented Organization Design



Methodology originally developed for a £300m UK public sector programme, but applies to work of any scale and type

http://bit.ly/good-methodology

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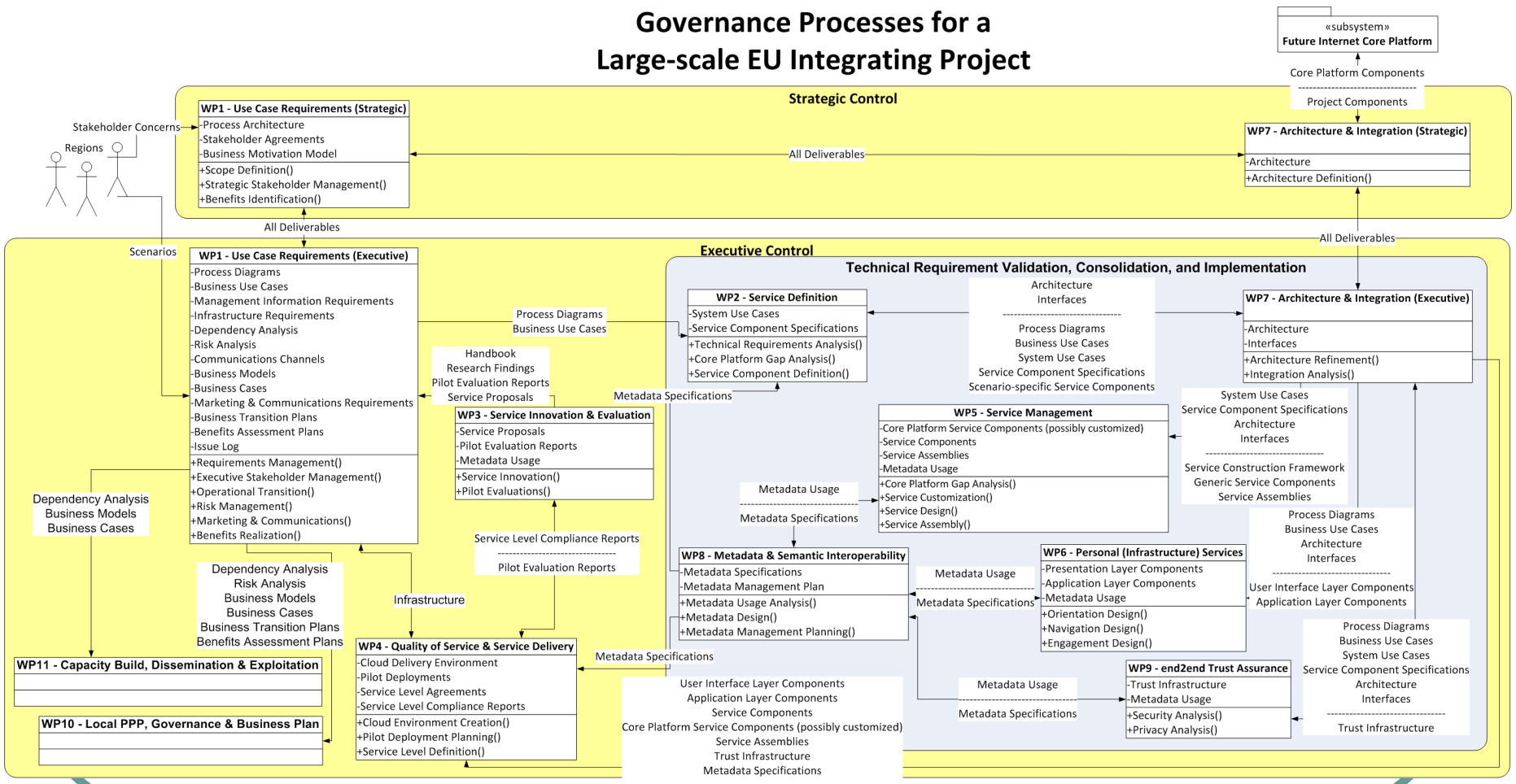
Example of GOOD Governance



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Benefits of GOOD

- Align change with stakeholder concerns
- Integrate change management activities
- Measure and ensure success

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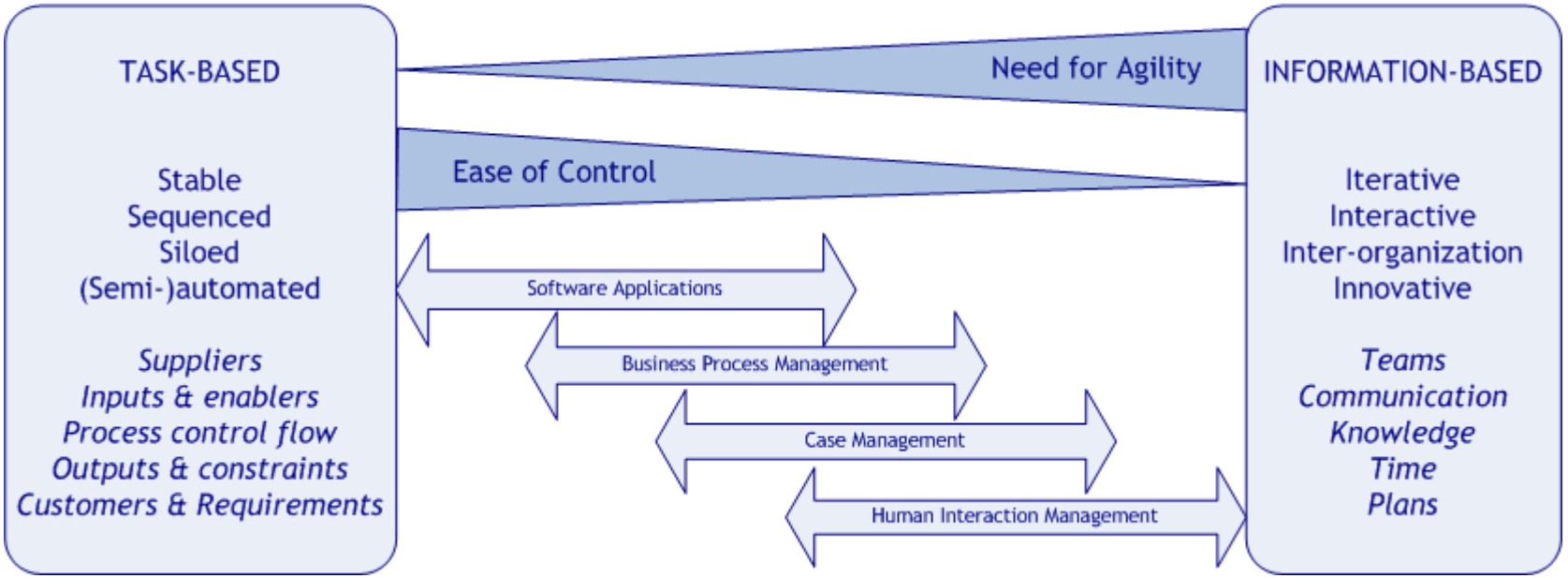
The Business Process Spectrum



But what to put where in your IT stack?

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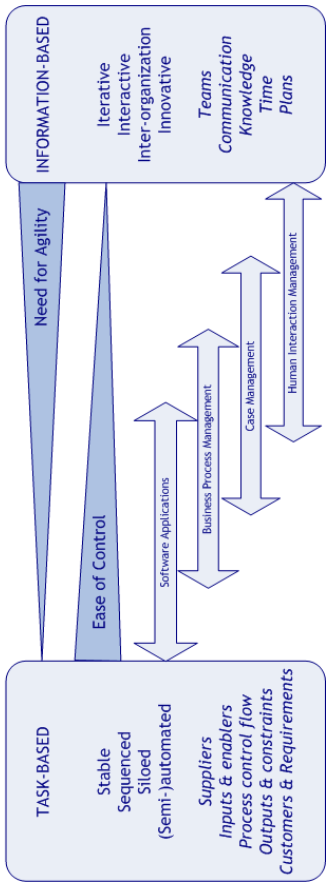
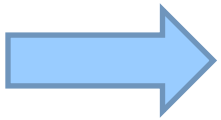
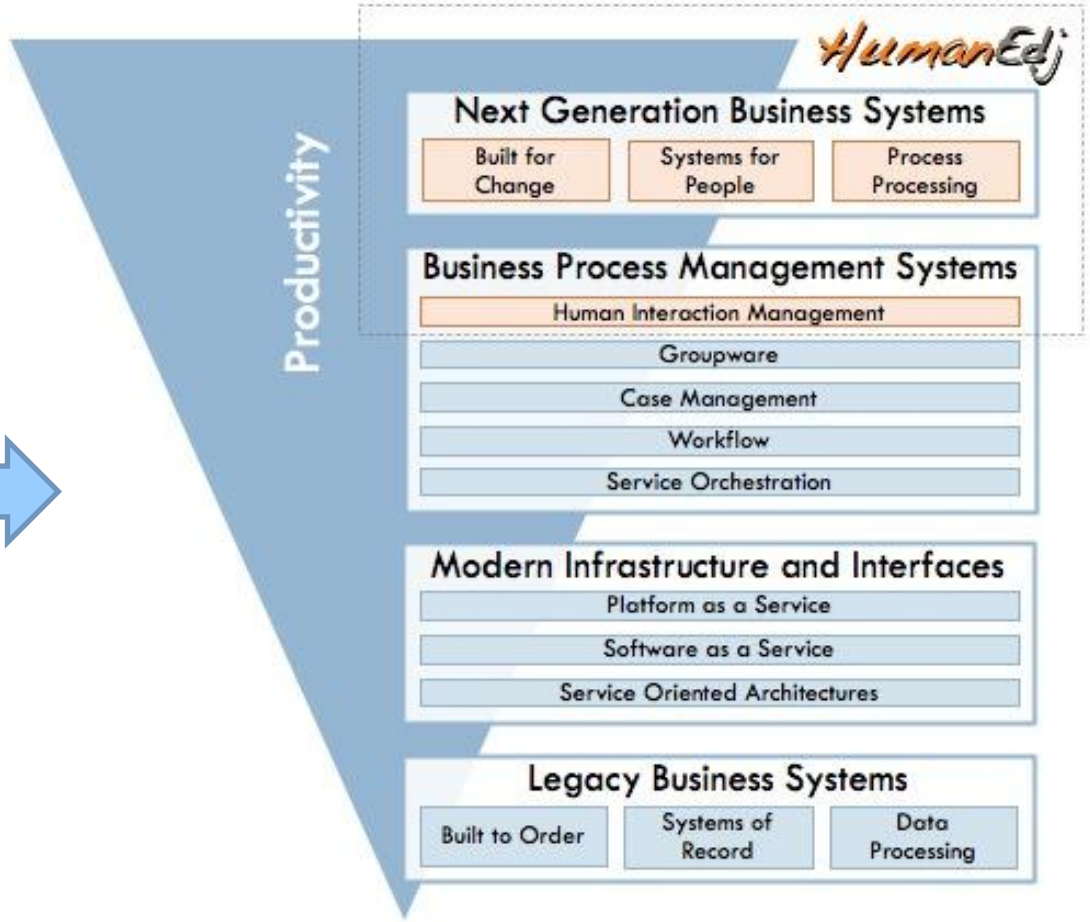
Next Generation IT Stack







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HumanEdj

- Reference implementation of a Human Interaction Management System (HIMS)
- Web software
  to define templates for collaborative, cross-boundary human work
  then create adaptive, manageable Plans to do the work itself
  - Pure Java application
  - API of scalable, stateless REST Web services
  - Customizable AJAX Web UI (JQuery, Freemarker)
  - Windows desktop UI for expert users
  - Cross-platform mobile interface planned
- For non-technical users
  - Average workshop feedback score from NHS staff over all questions: 9/10

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HumanEdj Testimonials

- *"The first fundamental advance in personal productivity since the arrival of the spreadsheet"*
  Information Age

- *"The next logical step in process-based technology"*
  Chair, Workflow Management Coalition

- *"A HIMS is the top layer of a new IT stack, in which the Intranet provides access to the enterprise backbone (including ACM and BPM systems) via HIMS Plans. HumanEdj has a very powerful and flexible representation of goals, tasks, and tracking of such. It is very much the prototype of what I would like to see in all systems."*
  Chair, Workflow Management Coalition Technical Committee

- *"The NHS Institute for Innovation and Improvement deployed HumanEdj with a site license in order to understand and improve collaborative, adaptive, cross-boundary work. Use of HumanEdj has enabled non-technical business users to transform processes previously modelled as complex, static flowcharts into simple, dynamic Plans."*
  Chief Information and Knowledge Officer, NHS Institute for Innovation and Improvement

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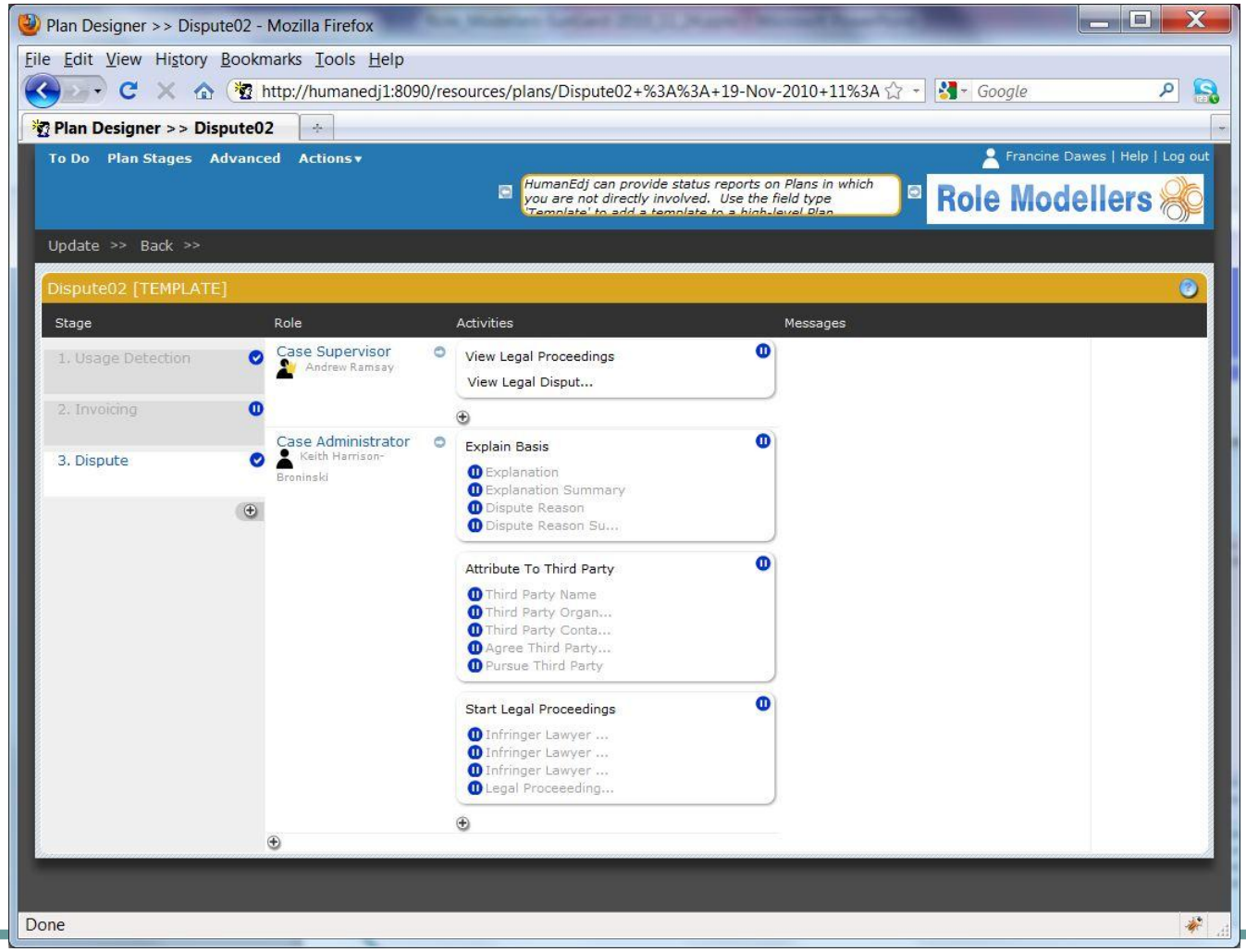
Example Plan template in HumanEdj



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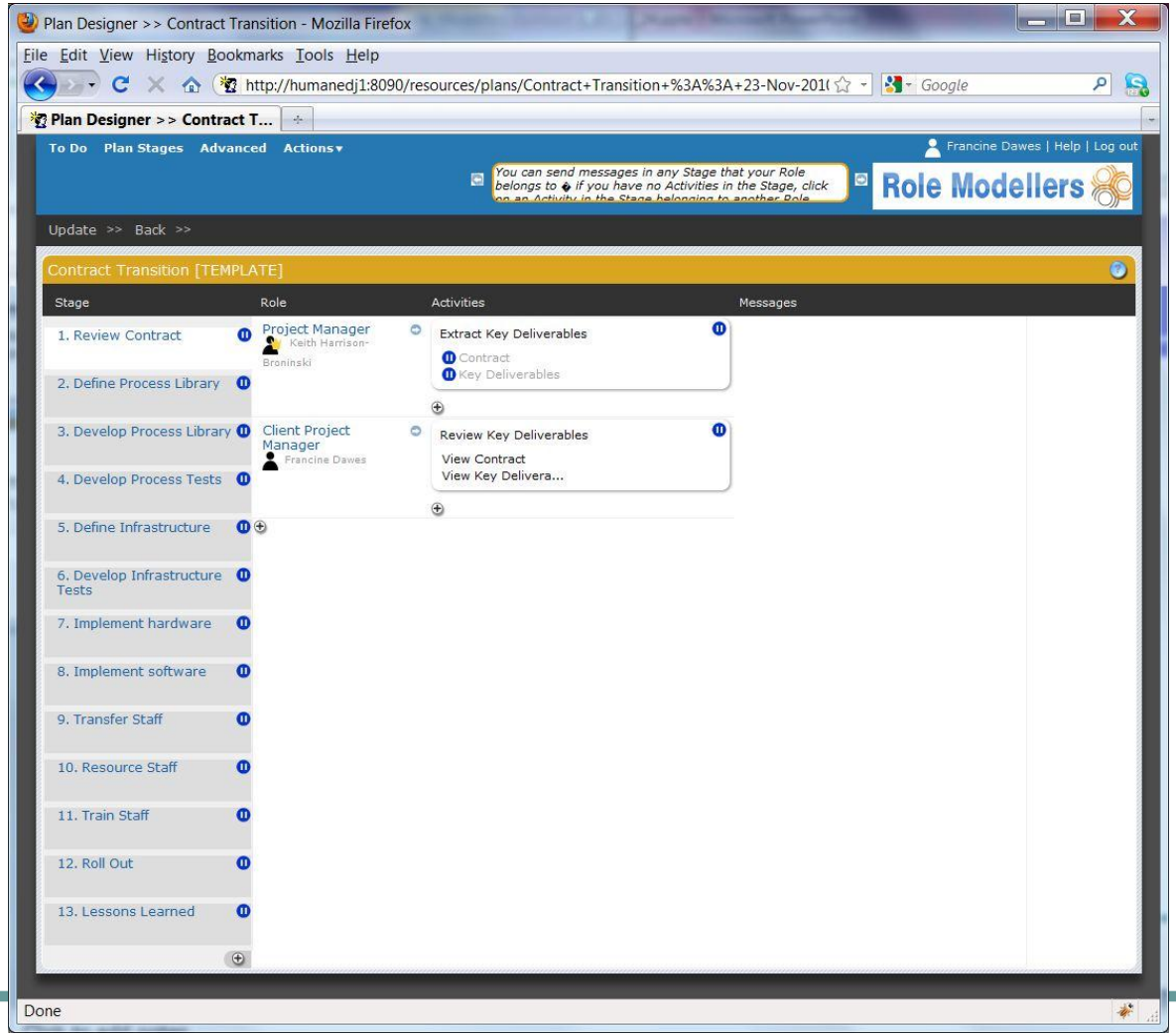
Another example Plan template



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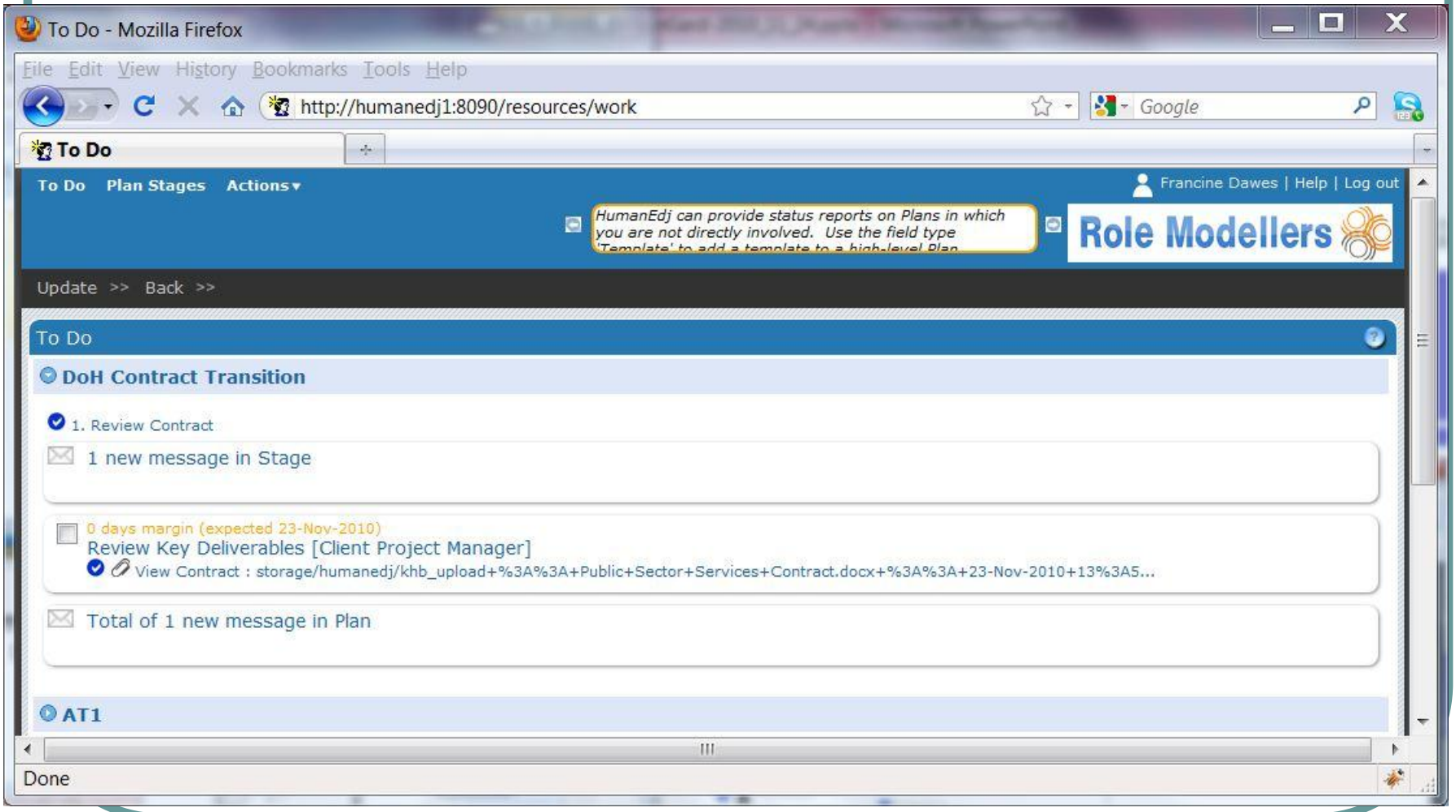
Using a HumanEdj Plan – 1 of 3



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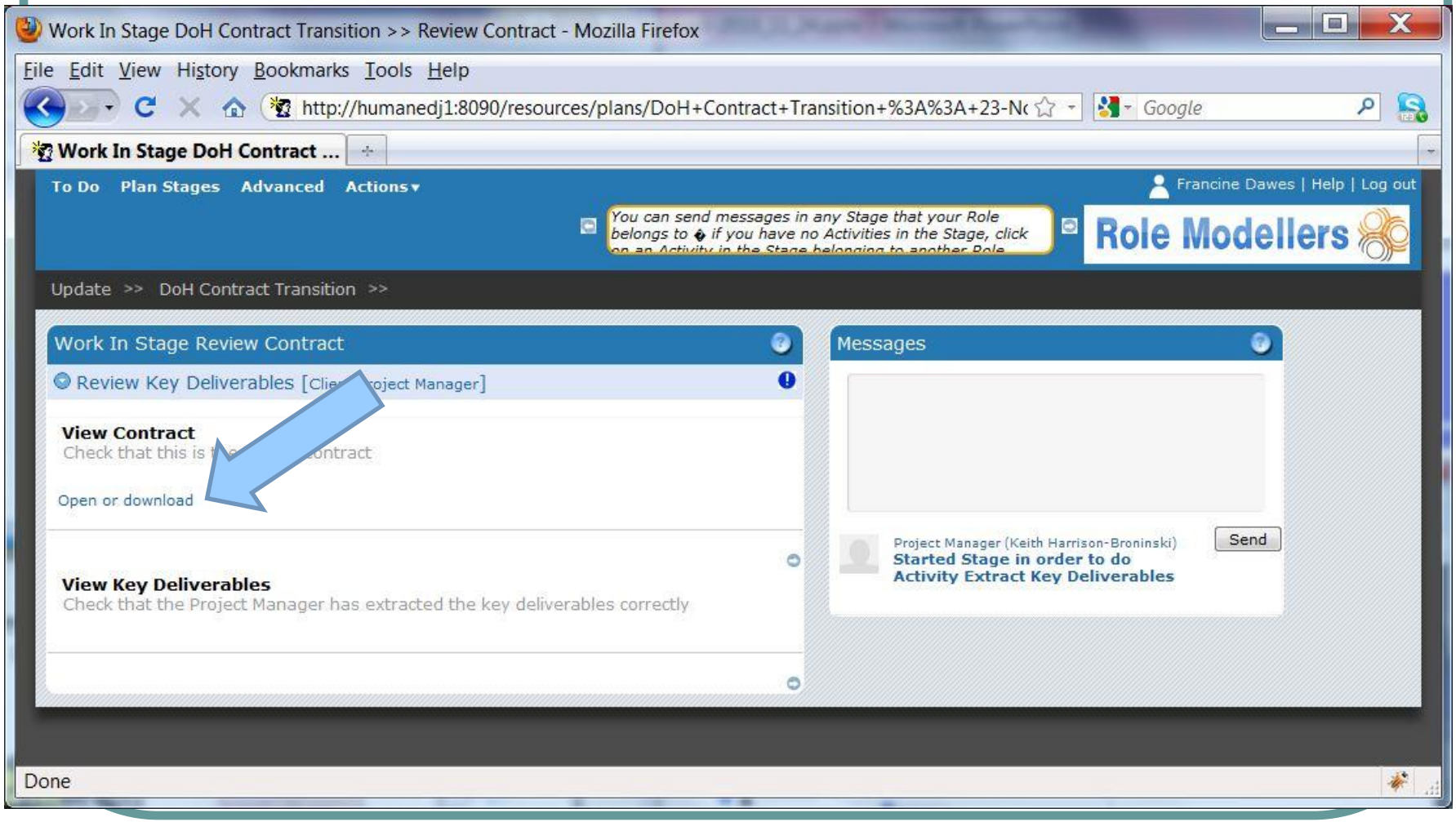
Using a HumanEdj Plan – 2 of 3



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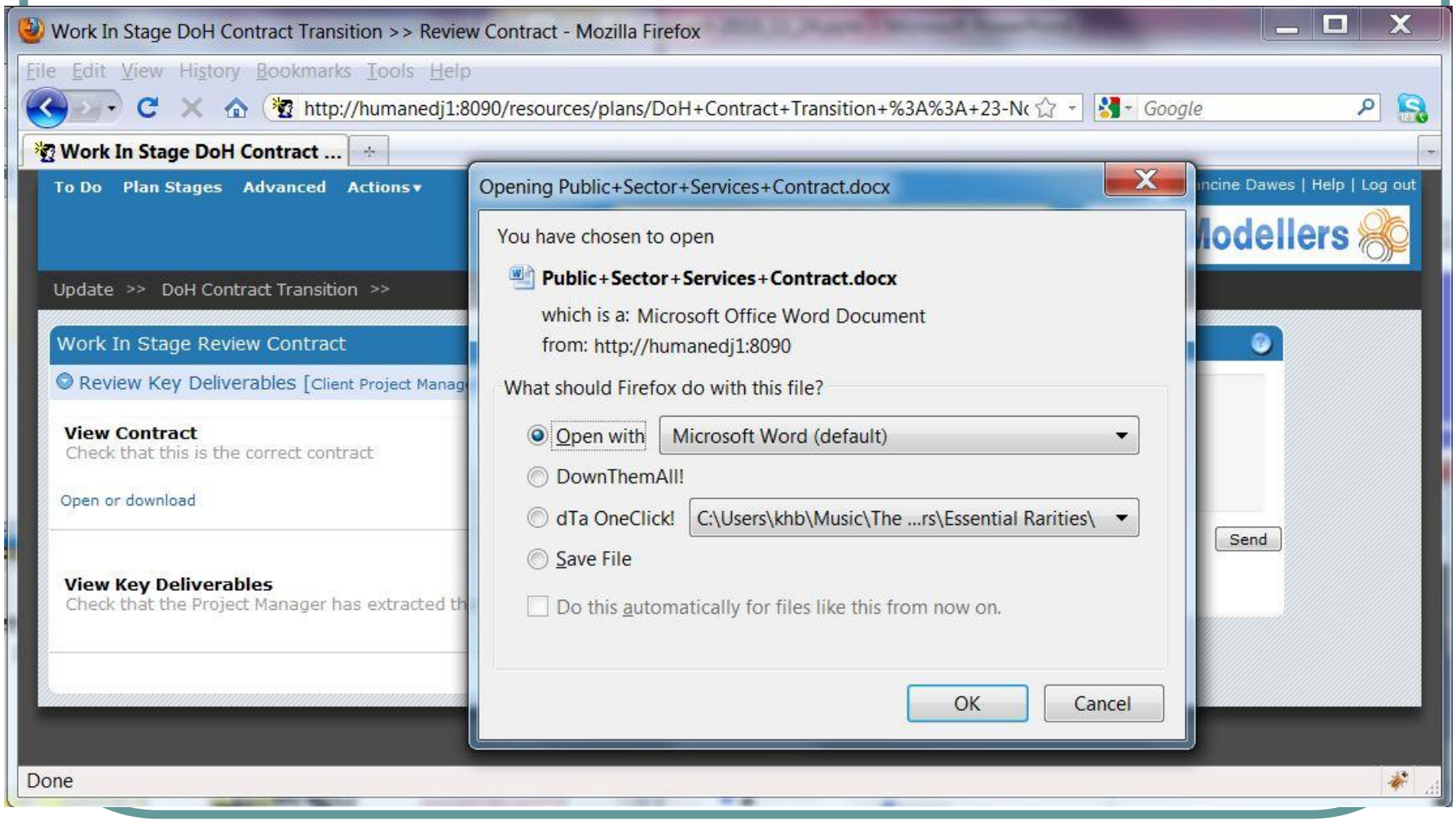
Using a HumanEdj Plan – 3 of 3



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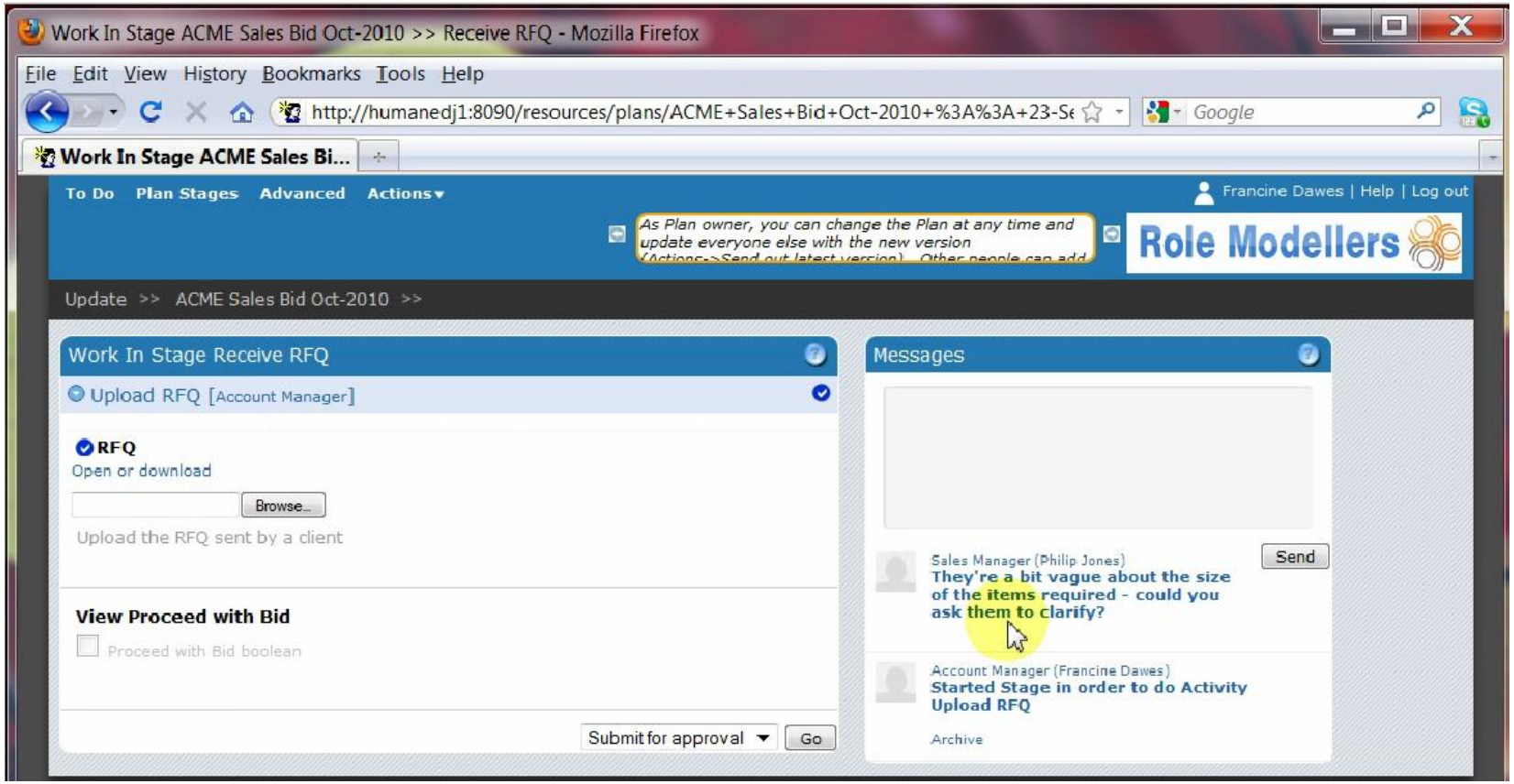
Structured communication in HumanEdj



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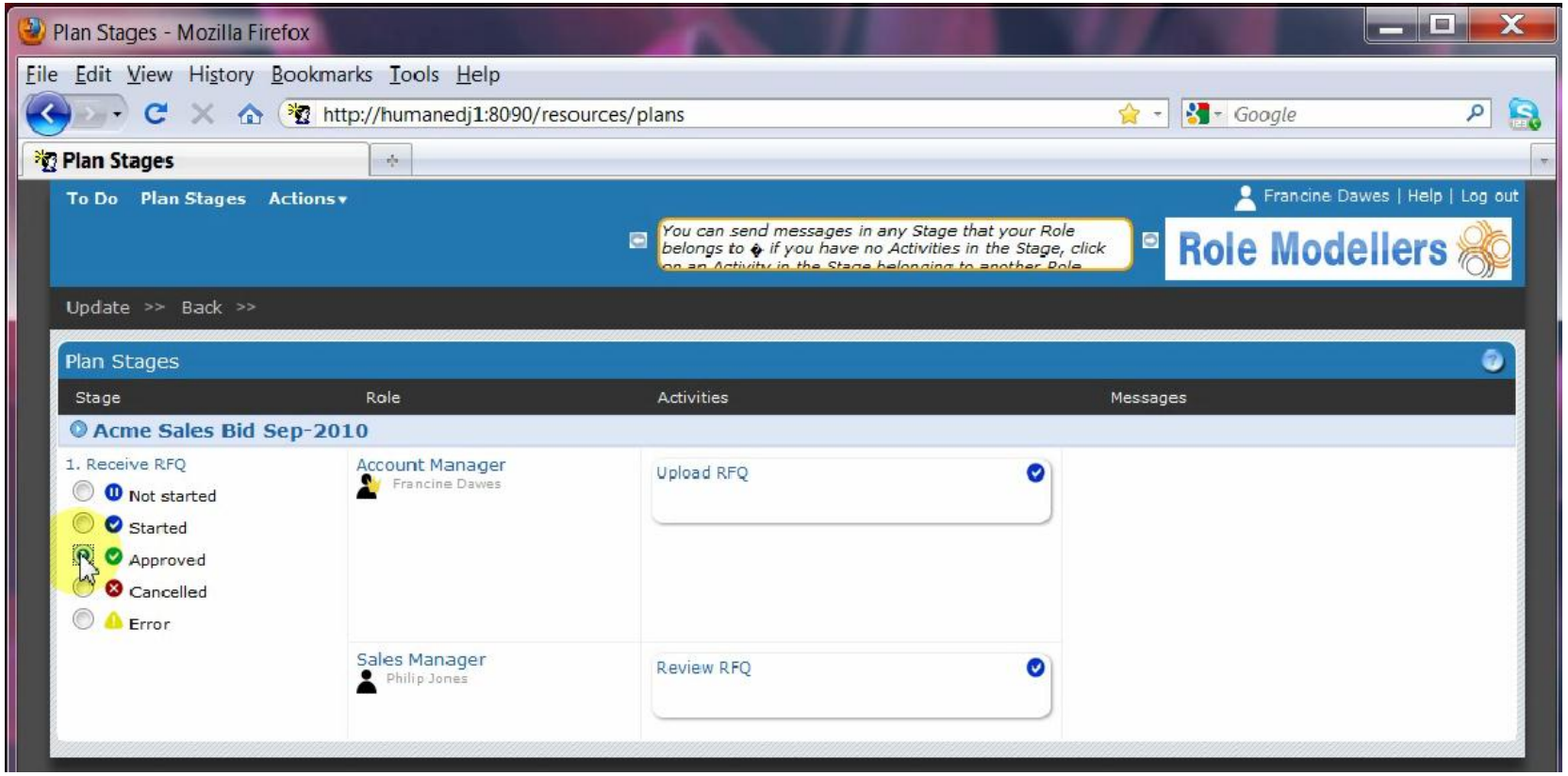
Managing work in HumanEdj



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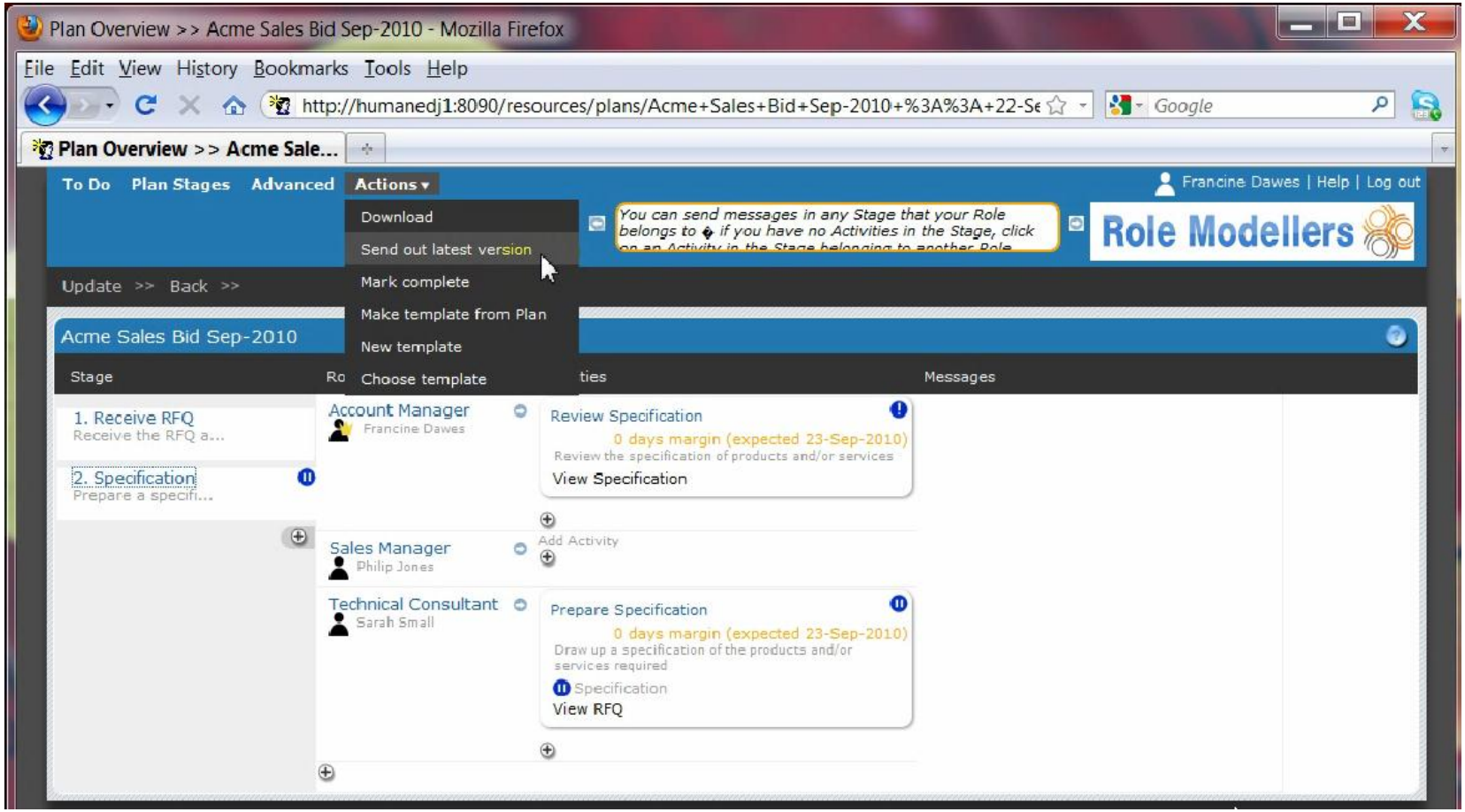
Revising a Plan on the fly in HumanEdj



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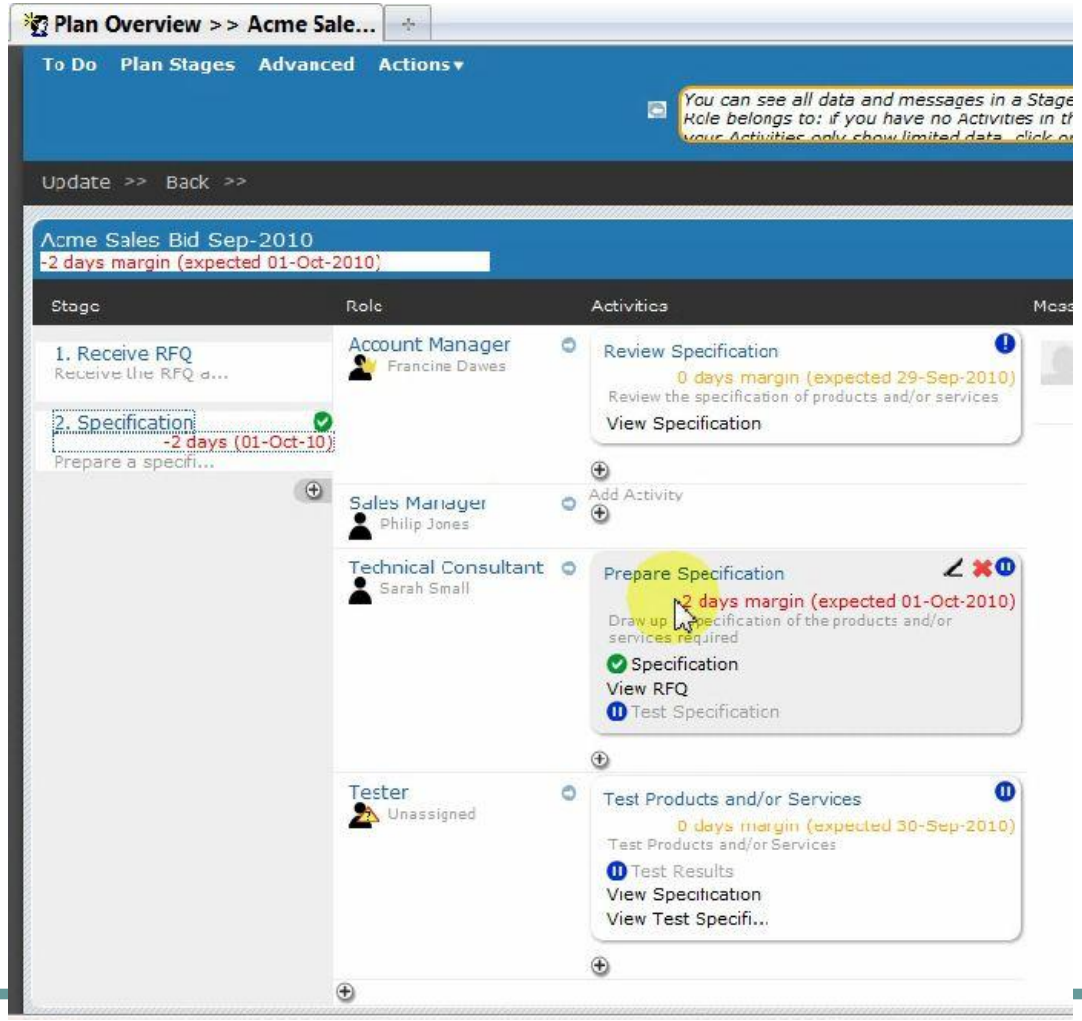
Fine-grained forecasting in HumanEdj



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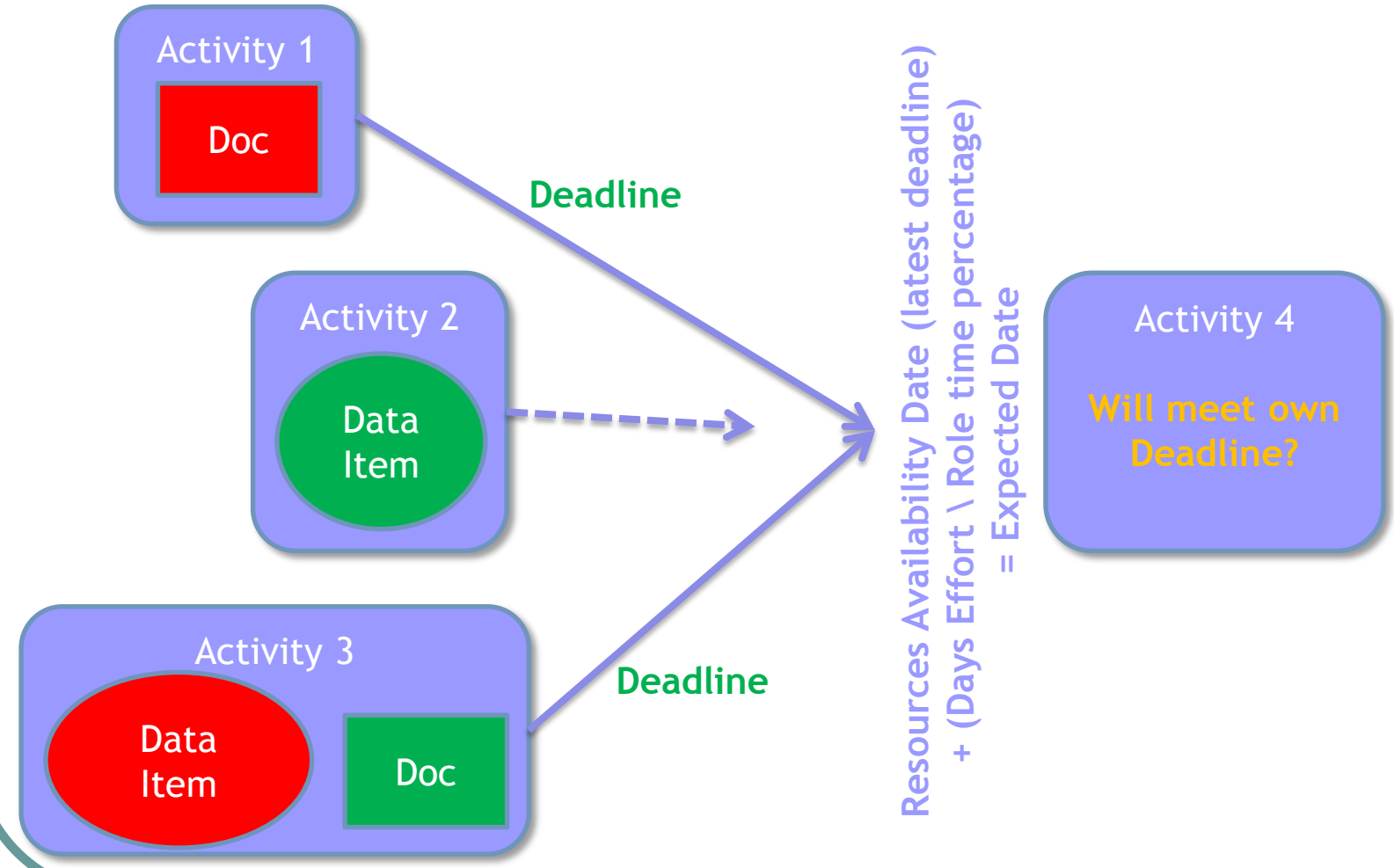
Fine-grained forecasting - explanation



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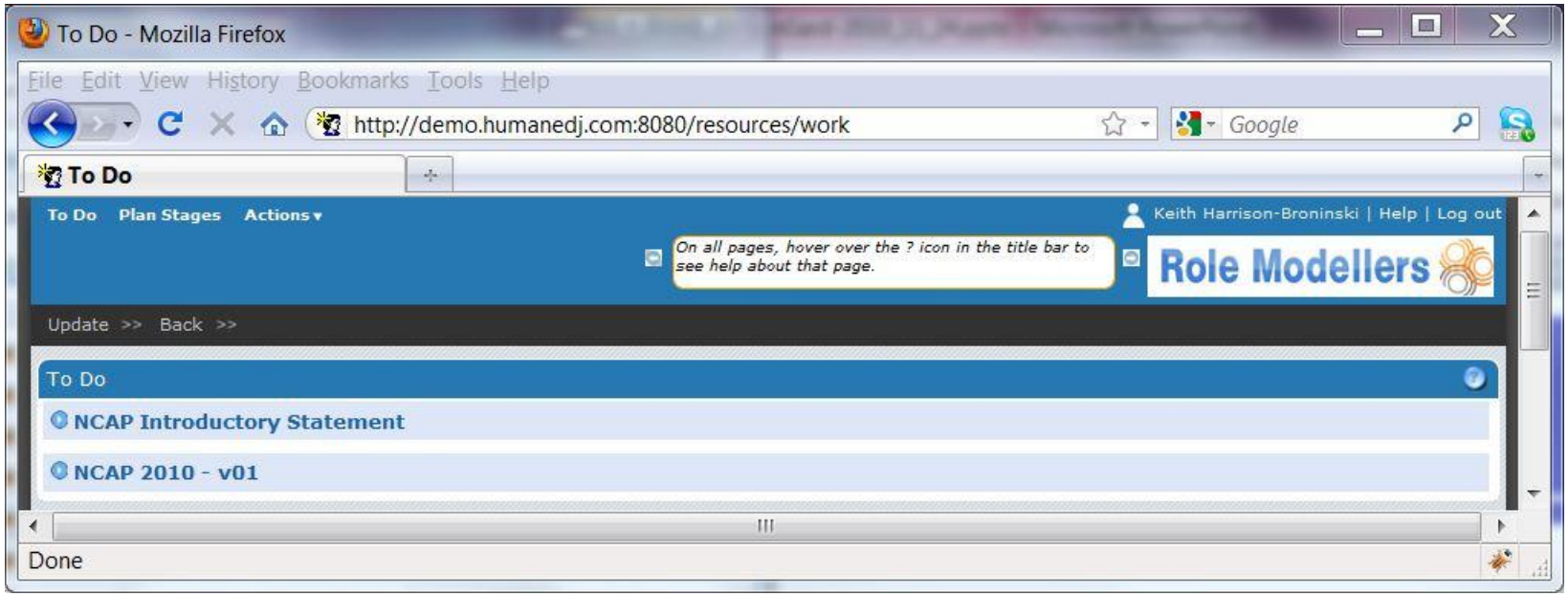
Sub-plans in HumanEdj – 1 of 4



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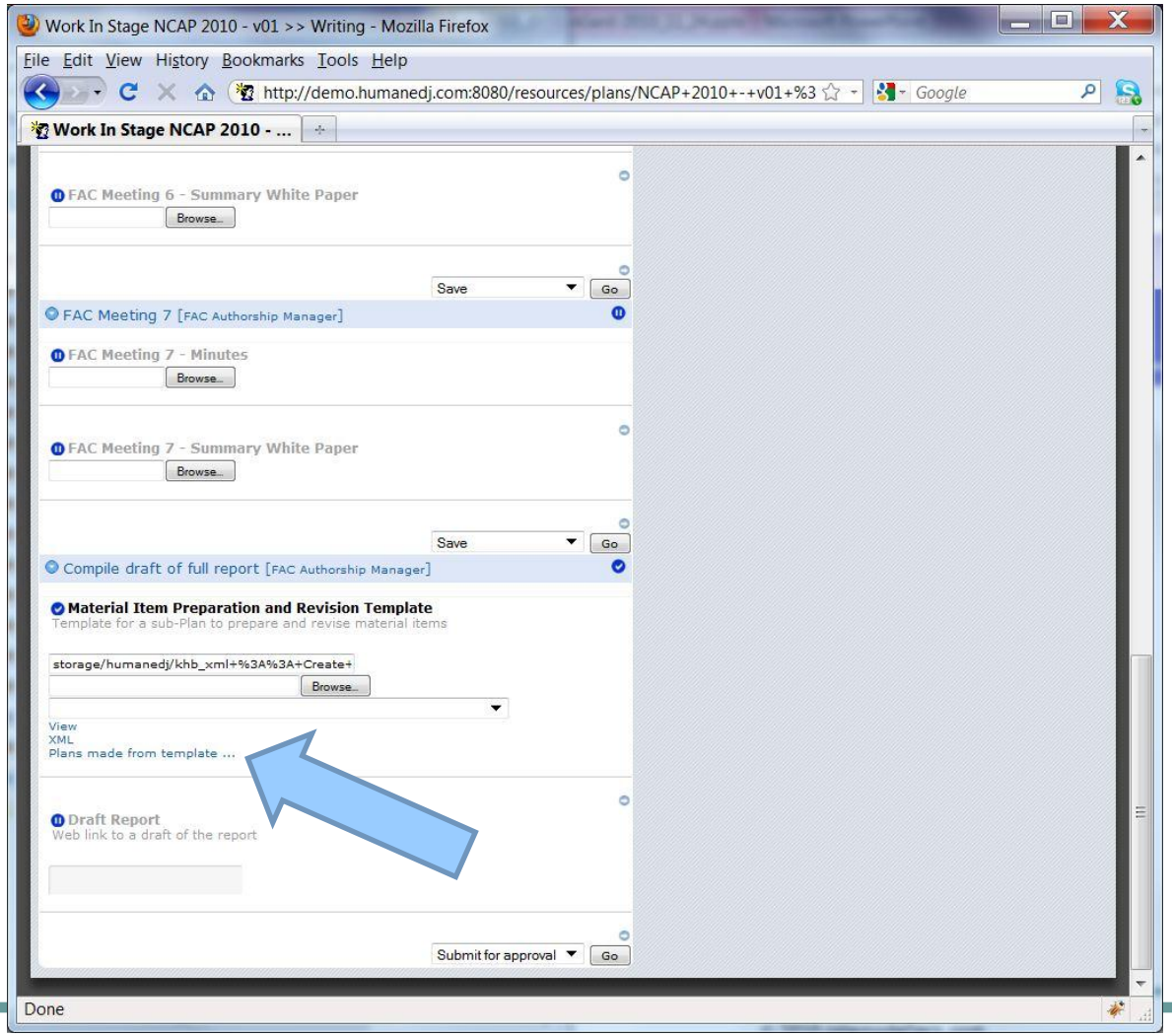
Sub-plans in HumanEdj - 2 of 4



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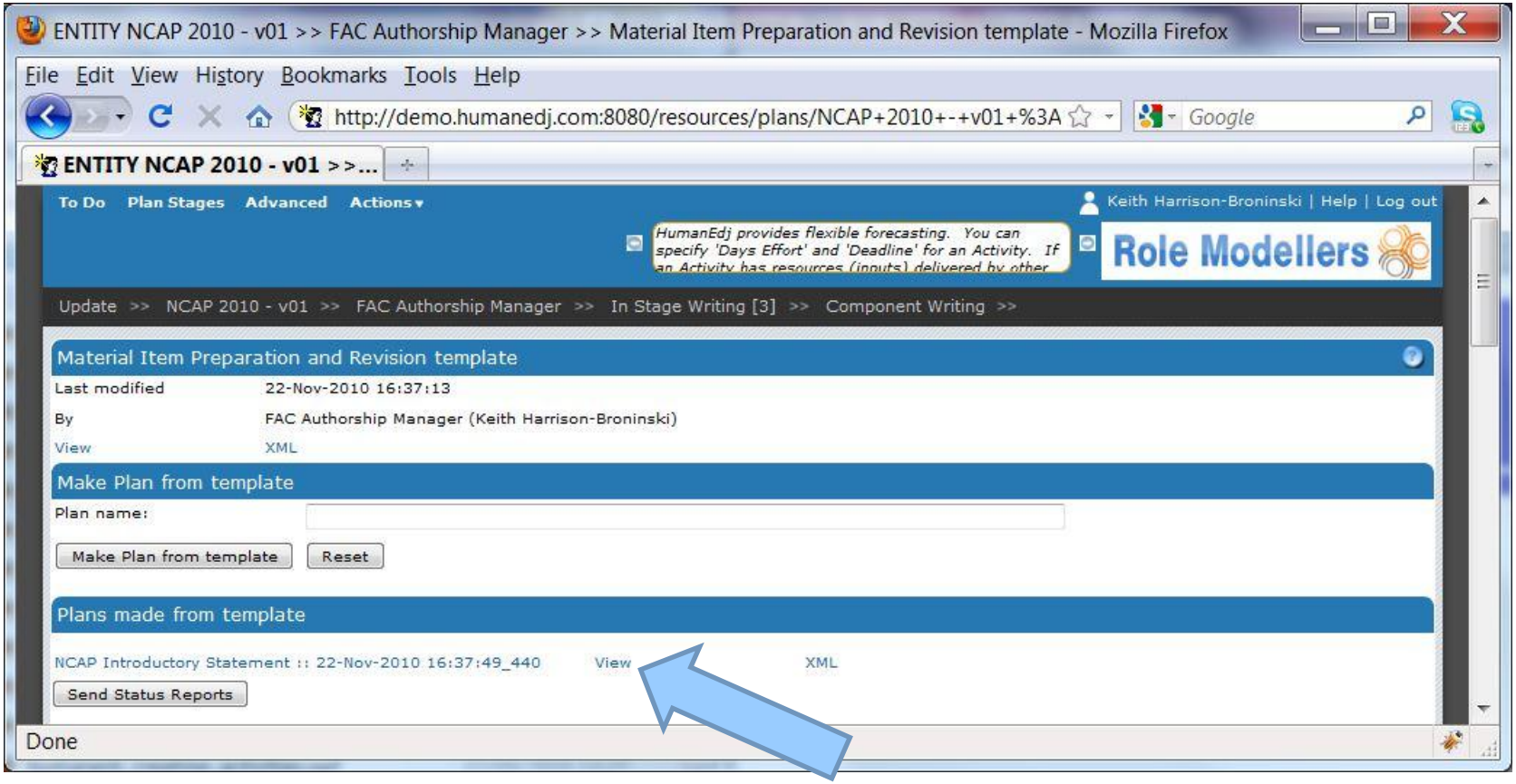
Sub-plans in HumanEdj – 3 of 4



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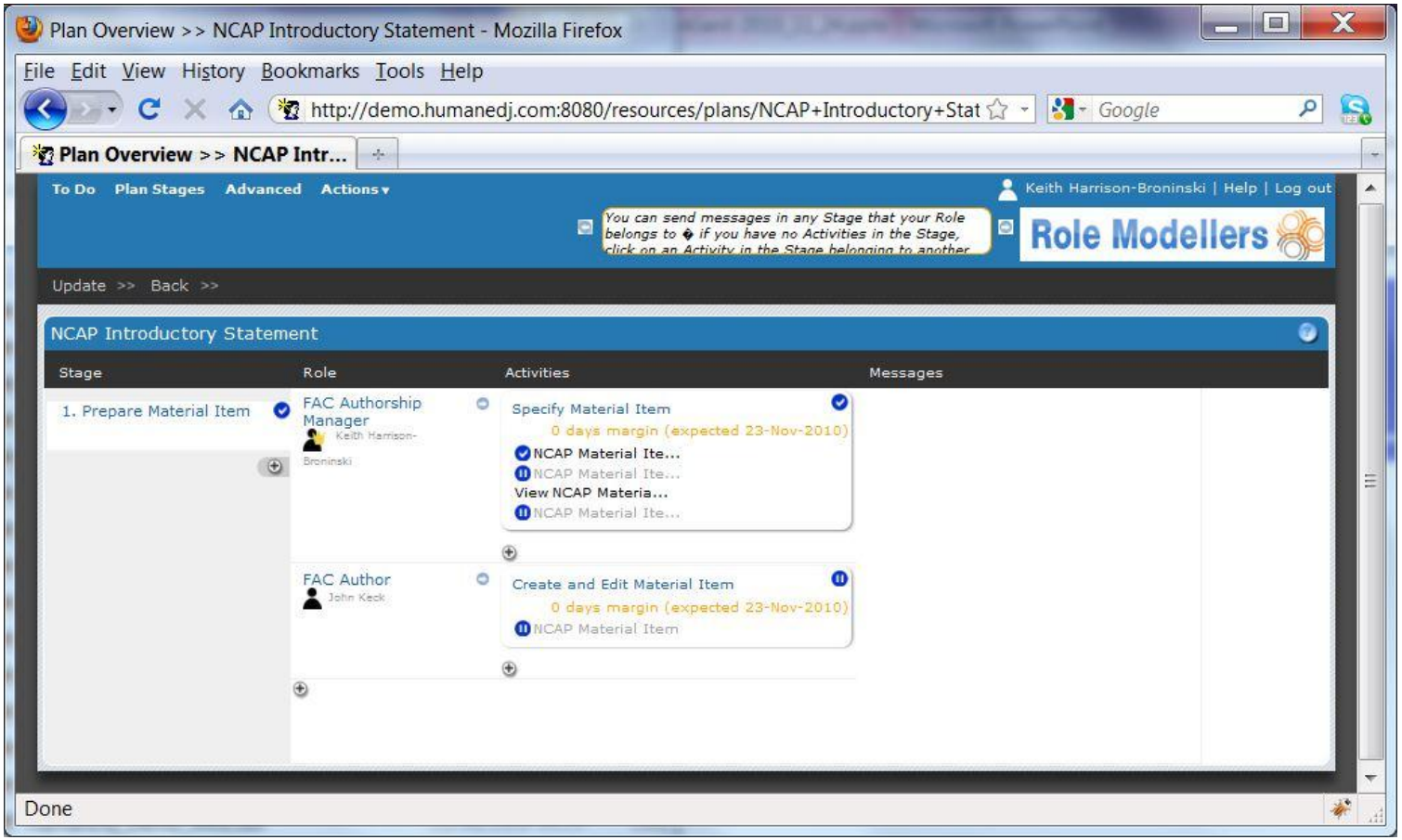
Sub-plans in HumanEdj - 4 of 4



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Still not quite enough …

- Which processes go where in the stack?
- Just about every software product claims support for “tasks”
- How is *work itself* distributed across the stack?

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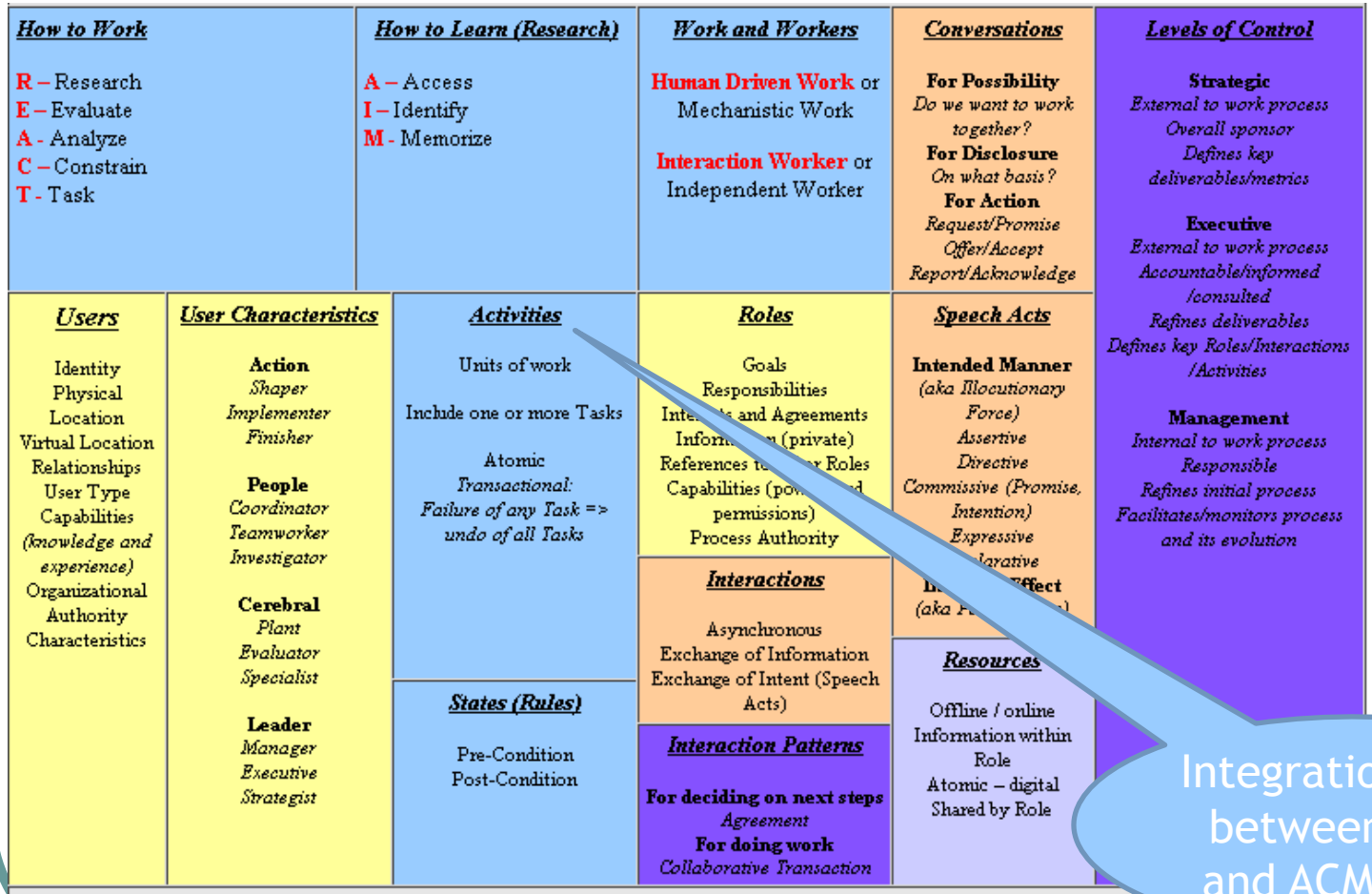
Moving down the stack



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Support HIMS Activities with business rules

- For example, using “Adaptive Case Management”
- Business rules provide choice of Tasks
- Knowledge worker selects
  - Tasks to use
  - Order of Task execution

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Automate HIMS Activities with a BPMS

- Orchestrate Web services
  - To implement routine processes
- With no human intervention
  - “Straight-through” BPM processes
- With limited human intervention
  - “Human-centric” BPM processes
  - Data entry (e.g., financial data)
  - Decision points (e.g., document approval)

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At the top, put Big Processes

- **Overarching**
  - Help managers improve productivity
- **Underpinning**
  - Help IT become more flexible
- **Connecting**
  - Help build partnerships inside and across organizations
- **Remembering**
  - Help organizations improve operations

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1 of 4: Overarching processes

- Bring order to chaos
  - In highly collaborative and pressurized conditions
  - Rework typically leads to wasted effort and repeated frustration
- Newsroom platform
  - HIMS for content creation
  - BPMS for transcoding and distribution
- Productivity improved four-fold
  - Example of **Management Control**
  - Use GOOD for higher-level control via a HIMS

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2 of 4: Underpinning processes

- Large-scale dynamic processes require **utility IT**
  - Flowcharts too technical
  - Rules too complex
- Customer service planning
  - Huge process across multiple departments
  - No integration needed
  - Under 2 hours to implement in HumanEdj

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3 of 4: Connecting processes

- Key enterprise processes cross boundaries
  - Participants may use different servers
  - Participants may have different software
- New project proposal
  - HIMS for collaboration
  - ECM for document storage
- Subsequently extended
  - To all human resource sharing
  - Back to idea origination
  - Forward to project execution with partners

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4 of 4: Remembering processes

- Need to improve knowledge work
  - Not just routine work
  - Lean and Six Sigma not enough
- Patient treatment in healthcare
  - HIMS to let patients manage own cases
  - ACM for decision support
  - Business Intelligence to analyse past cases
- Improvement is itself a Big Process

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Benefits of HIMS for Big Processes

- Quadruple productivity
- Build dynamic infrastructure
- Make effective partner relationships
- Continually improve knowledge work

More information:

http://bit.ly/him-theory
http://bit.ly/good-methodology
http://bit.ly/hims-technology
http://bit.ly/humanedj-case-studies
http://bit.ly/humanedj-introduction

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